Systems

WITS BASICS

WITS Basics User Guide: System Overview

WITS

FEi Systems

3/3/2015

Introduction

This guide has been designed as a basic reference for use when exploring the WITS Electronic Health Record System. Topics covered in this guide include basic navigation features, system conventions, screen formations, hints, and login information.

Intended Audience

This user guide has been prepared for all WITS users.

Note: System Requirements
WITS is compatible with up-to-date versions of most modern browsers such as, Internet Explorer version 10+, Firefox, Google Chrome, and Safari. All browsers require Silverlight plug-in for WITS Scheduler.

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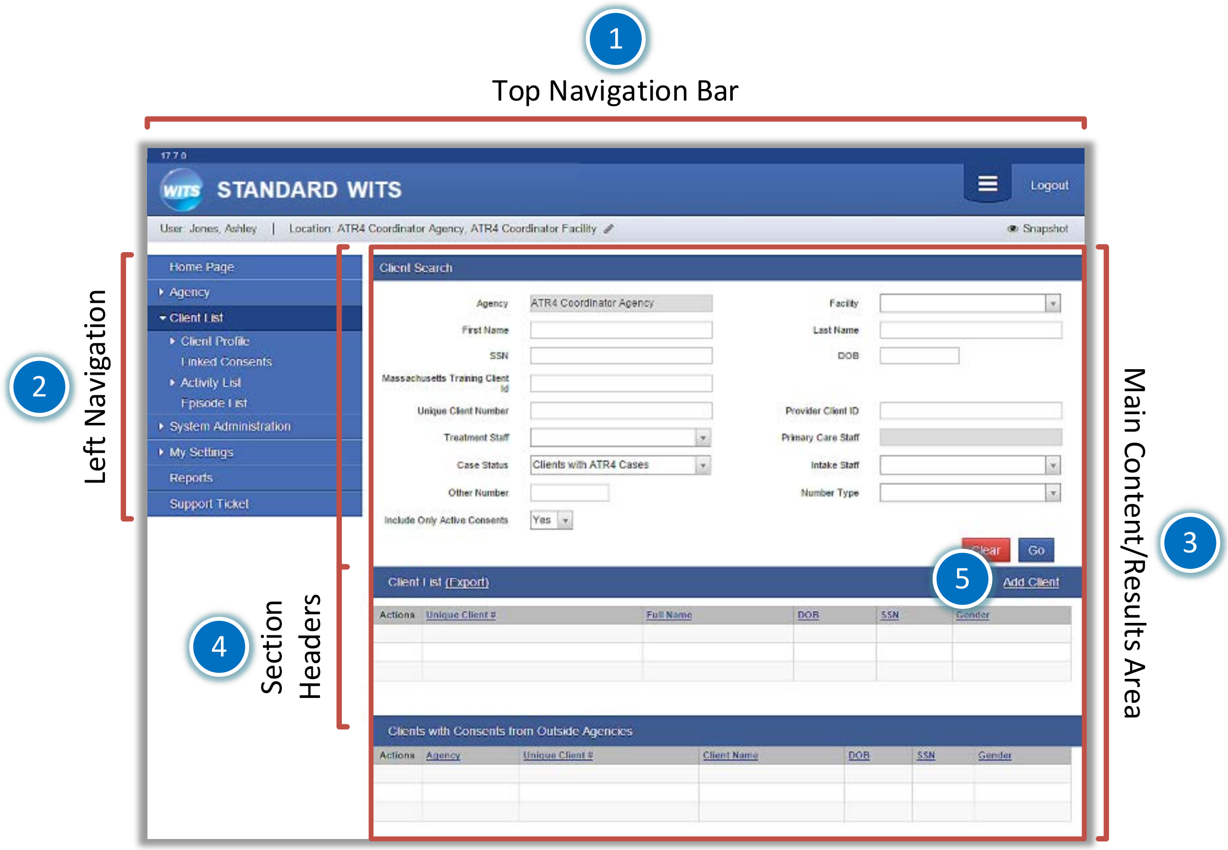
Section 1. WITS Basics

User Interface

WITS is a sophisticated system designed to accommodate many types of users and staff. In fact, WITS can be customized by any system administrator to create staff accounts with user-specific access and permissions. This translates into a personalized WITS interface whereby the end-user will only have access to the modules, screens, and functions that have been assigned to them.

As a result of the personalized user interface, end-users will not be distracted by additional screens, modules, or functionality that often can reduce productivity and make an interface less user-friendly. To get the maximum use out of the WITS system, the user should be aware of the following interface features and navigation, including:



1. **Top Navigation Bar:** This area contains information that helps the user know his/her current context in the system, which includes:
    a. **User:** the Person currently logged into the system
    b. **Location**: the Agency and Facility currently selected

2. **Left Navigation:** WITS has been designed to follow common behavioral health service workflows. As a result, when using the left navigation (menu), you will immediately note that most of the modules and screens have been logically organized in a manner that makes sense to many Clinical staff, Case managers, and Administrators.

3. **Main Content/Results Area:** The main area of the screen will constantly change as you progress through your workflow. Typically you will first see either of these sections:
    a. **Search**: for finding information already entered, or
    b. **Profile**: for entering new data

4. **Section Headers:** WITS often contains screens that are comprised of several sections. Typical headers indicate **Search**, **List** and **Profile** (or entry) sections of screens. These section headers are always dark blue and may contain actions such as "**Add**" or "**Export**". If you are in the context of a client, a section header will also display the client name, unique client number from WITS (UCN), and case if you are within the activity list.

5. **Function Links:** If the screen allows you to perform certain functions, such as "**Add**" or "**Export**", the functions appear as underlined links. A "hand" will also appear when your cursor floats over the action item, reminding you that you can "click".

Action Buttons		Data Fields	
Cancel	Cancels the current action and returns to the previous screen		**Mandatory field:** MUST have data in order to save record
Save	Saves data entered and remains on the current screen		**Read only:** system generated field, for display only and cannot be edited
Finish	Saves data entered and returns to the section start page		**Discretionary field:** will not affect completion or saving of record
← →	Navigate through the screens in each section (left and right arrow buttons)		**Missing Required field:** enter data before Save or Finish
Clear	Clears all criteria from the search tools when present		**Required for State Reporting:** record may be saved but will not be complete
Go	Run the search tool using the criteria entered		
> <	Move data from one choice box to another (mover buttons)		

Action Links	
Alert Type Alert Name	Clicking on a column heading will reorganize the table alphanumerically from 1-Z and then Z-1
Administrative Actions: Remove Account, Reset Credentials, Disable Account, Expire Credentials	Administrative Actions
	On list screens, hover over the Actions pencil icon to quickly select from associated screens

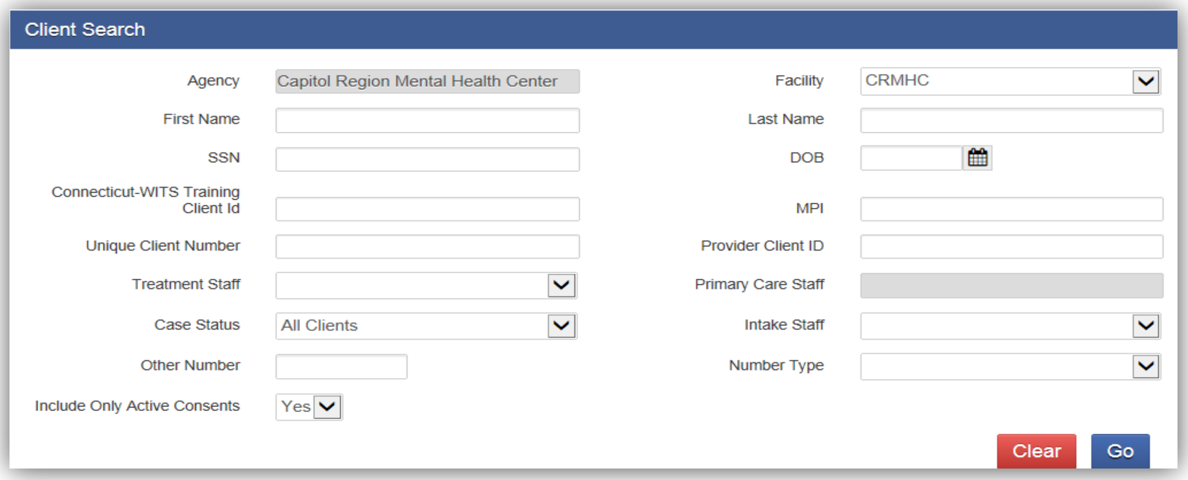
System Notifications	
Required fields are missing.	**Error:** WITS will not allow you to move forward until you have addressed the error stated
No current Facility selected. Please select an existing Facility.	**Informational Message:** Informs users that something has occurred
This client record is in a different facility. Your current context has been changed.	**Warning:** Data has been entered which falls outside of a certain parameter. The record can be updated, but you have been warned

Screen Formats

WITS has three basic types of screens: **Search**, **List**, and **Profile**.

Search

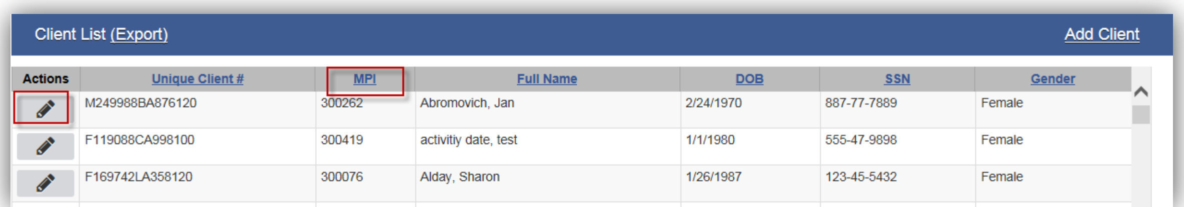
Search screens allow you to search for items that have already been entered into the system. The more information entered in the search fields, the more restrictive the search. Search screens are identified with the "**Go**" and "**Clear**" buttons. **Go** initiates the search, and **Clear** will clear all search criteria.



Lists

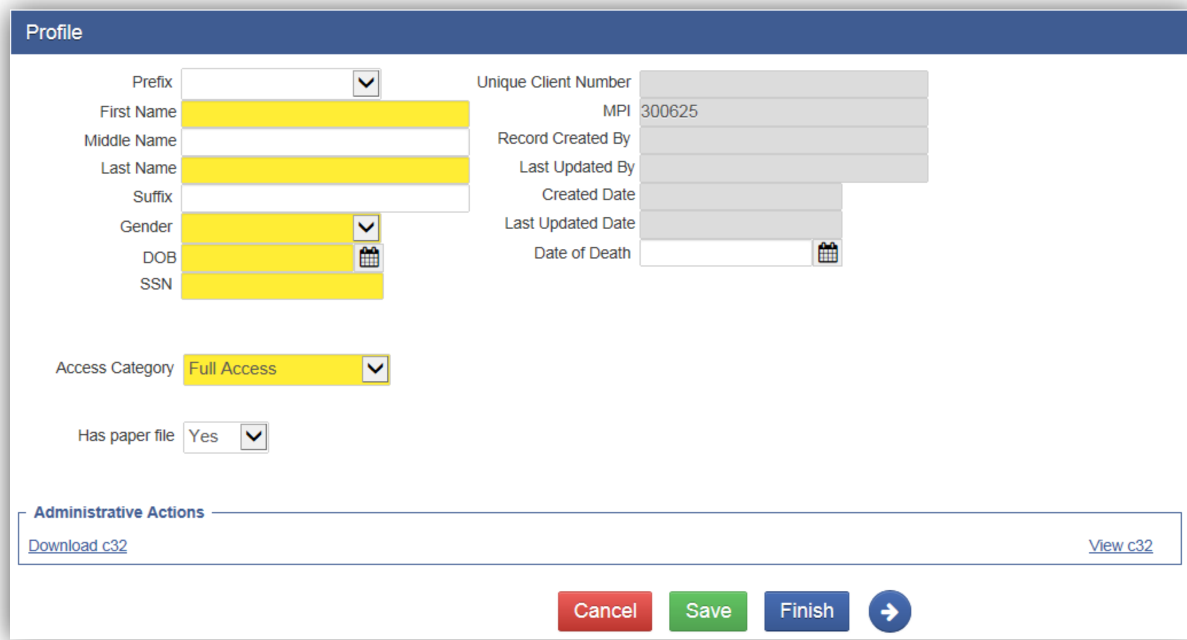
A search will result in a populated list, with columns showing various data elements. All lists are sortable by clicking on the column header.

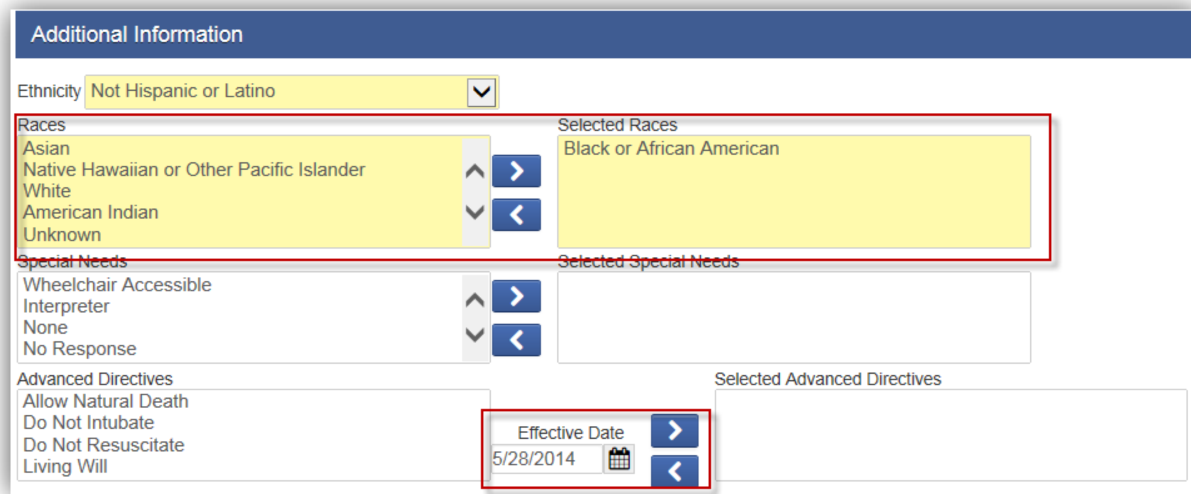
- Many lists have an "**Actions**" column offering, functions that can be applied to a selection from the list.
- In addition, many lists have an "**Export**" feature, allowing you to export data on the list into an excel spreadsheet. Exports are great alternatives to reports.



Profile

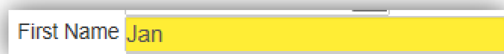
Profiles display the main content area for data entry. Profile screens are identified with the "**Save**", "**Cancel**", or "**Finish**" buttons. **Cancel** returns to the prior screen or list without saving. **Save** will check any business rules associated with the screen before saving the data, and will keep the user on the current screen. **Finish** will save the data and return the user to the previous list screen.



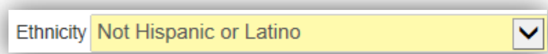


Data Entry Tips

WITS uses colors on certain fields to indicate whether they are required, or read only:

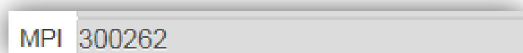


A dark yellow field is required and must be filled in before saving. An error message will appear if field is empty.



A light yellow field is required by business rules. The record can be saved without entering it, but may need to filled in later.

A white field is not required, and entry is optional.



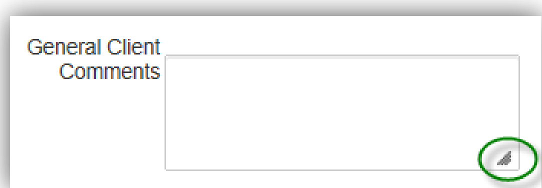
A gray field is filled by the system and is read only; it cannot be edited. It might display information entered in another screen.

WITS also has a variety of different entry field types:

Textbox

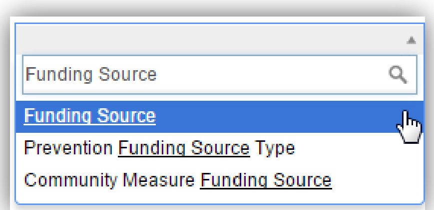
Textboxes allow the user to enter data manually. Some text boxes have specific formats that need to be entered, such as:

- Date fields, which requires M/D/YY or M-D-YY format (Years can be entered as a 2 or 4 digit year, but will be converted to a 4 digit year when saved).
- SSN and Phone Number fields, which require numbers, although dashes are optional and are added automatically when saved.
- Larger text boxes will expand if you pull the lower right corner with your mouse:



Dropdown Menu

A Dropdown Menu is used when only one entry may be selected from a list of values. Typically, these values are controlled by your administrator.

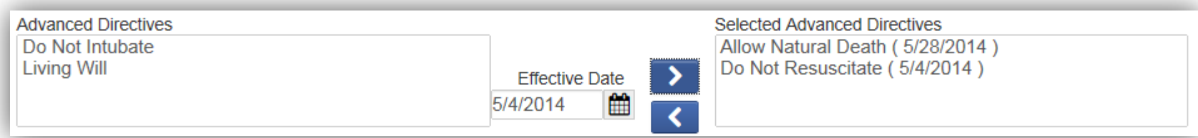


Mover Box

A mover box is used when more than one entry may be selected from a list of values. To choose multiple values from the list, hold down the control key as you click the values from the left side, and then click the **>** button to move the values to the right. To remove values from the selected list, click on the value(s) on the right that you want to remove and click the **<** button to move them left.

Mover Box with a Condition

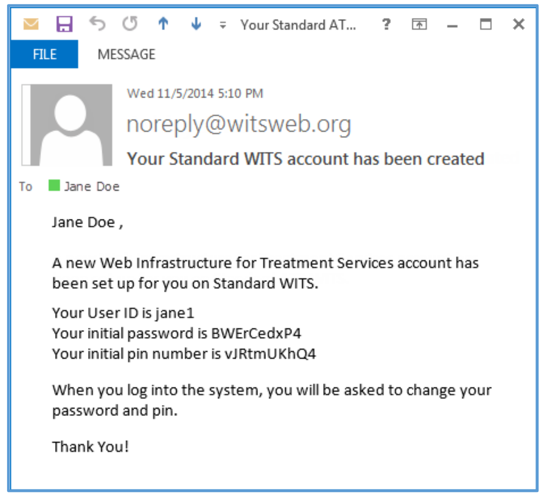
In some cases, you may be asked to provide a condition (such as a date) to go along with the value you choose. Make sure to enter the appropriate date for each selected value.



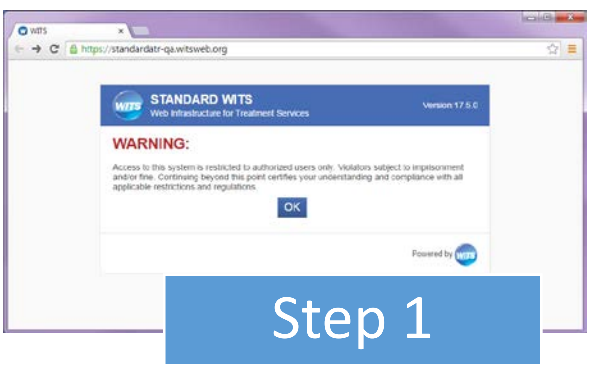
Section 2. Logging into WITS

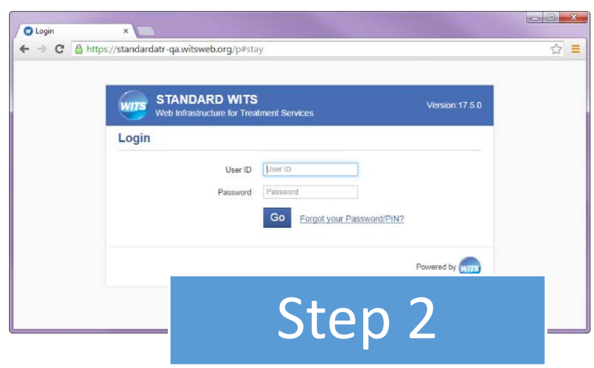
Where:* Internet Browser *> WITS Login Screen

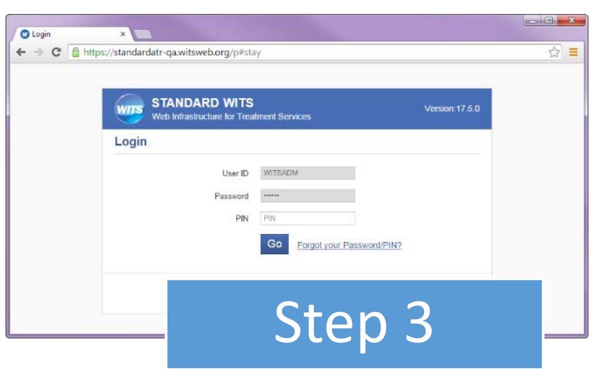
If this is your first time logging in, be sure to have your **Temporary Password** and **PIN** sent to your email by your system administrator. For returning users, complete steps 1-3 and skip 2a and 2b.



1. To login, open your browser then enter the **URL** of your **WITS** system.
2. Type in your **User ID** and **Password**, then click **Go**.
   a. *First time logging in:* enter your **Temporary Password** and **PIN** with your **new Password** and **PIN**. Click **Save**.
   b. *First time logging in:* Choose a Security Question from the dropdown box, type your answer, then click **Save**.
3. Enter your **PIN**, then click **Go**.





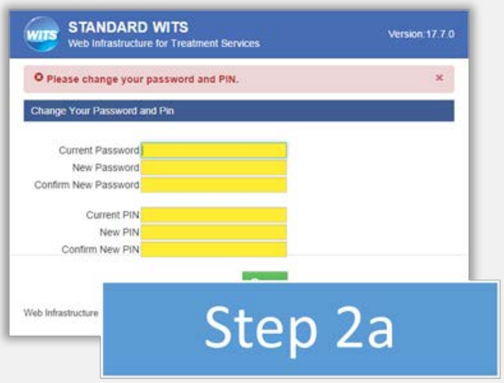


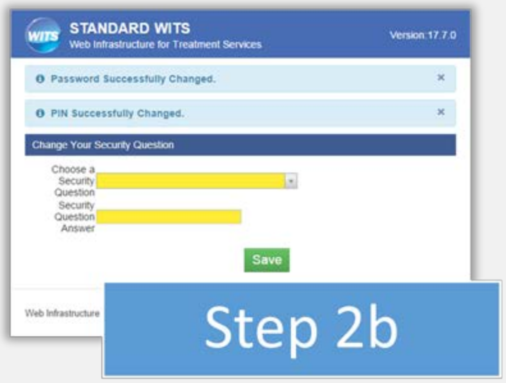
Note: First Time Logging In

If this is your first time logging in or if your credentials (i.e. password and pin) are expired, the system will show another screen to allow you to enter a new Password and Pin. Be sure to pick a Password and Pin that you can memorize and which is secure.

Password and PIN must be at least 6 characters long and include at least 1 number.

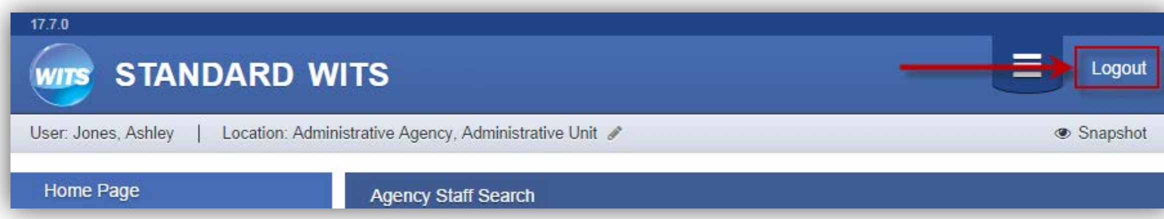
As part of the system's security features, you may be asked to reset your Password and PIN every few months. In addition, if you enter in a wrong Password and/or PIN multiple times, your account may be disabled. Contact your system administrator if this occurs.





Security and Logging Out

To logout of WITS, click **Logout** located in the upper right corner.



To ensure security, WITS will automatically lock an account if left open on one computer and then a different computer is used to log in. To prevent this issue, always remember to log out at the end of the day and anytime the computer is unattended.

Password and pins are not stored in the database and there is no way to retrieve them. If either of these codes is forgotten, your credentials will need to be re-set which will generate a new, "No-reply" email with temporary password and pin and you will have to re-do your password and pin. The training password and pin never have to change, but the production site passwords and pins are changed every 60 days.

Changing Facilities

Where:* *My Settings* > *Change Facility

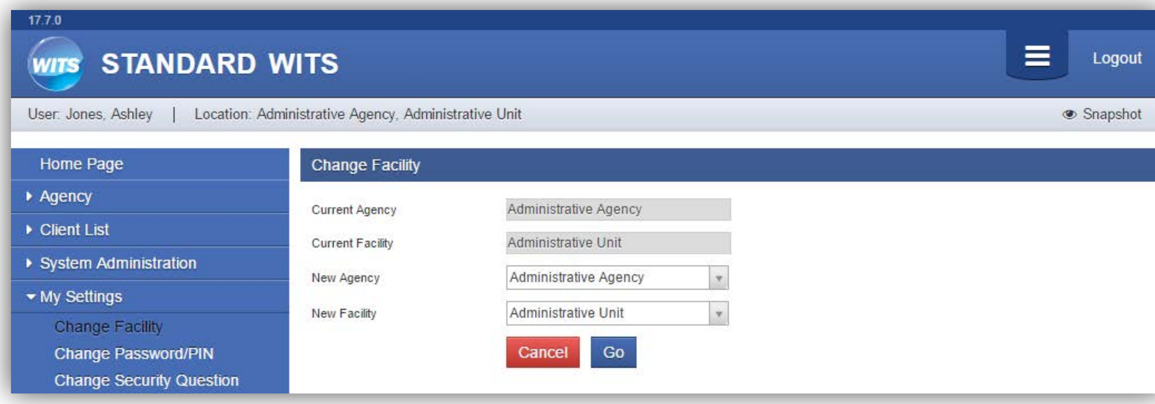
The **Change Facility** screen is used to change the agency/facility you are currently logged into, or for an administrator or staff member who has been assigned to multiple agencies/facilities.

There are two ways to access the Change Facility screen:

- From the left menu, click **My Settings**, then select **Change Facility**,
- Or, from the top navigation, click on your current **Location** to open the Change Facility screen

Once on the Change Facility screen, click on the **New Agency** and/or **New Facility** dropdown menus and select from your assigned agencies and/or facilities, then click **Go**.

Tip: Check the top of your screen to make sure that **"Location:"** is displaying the desired location you have selected.



Section 3. Searching and Entering Client Profiles

Where:* Client List *> Client Profile

Before creating a new client record, search for your client to make sure the client is not already in WITS.

Search for a Client

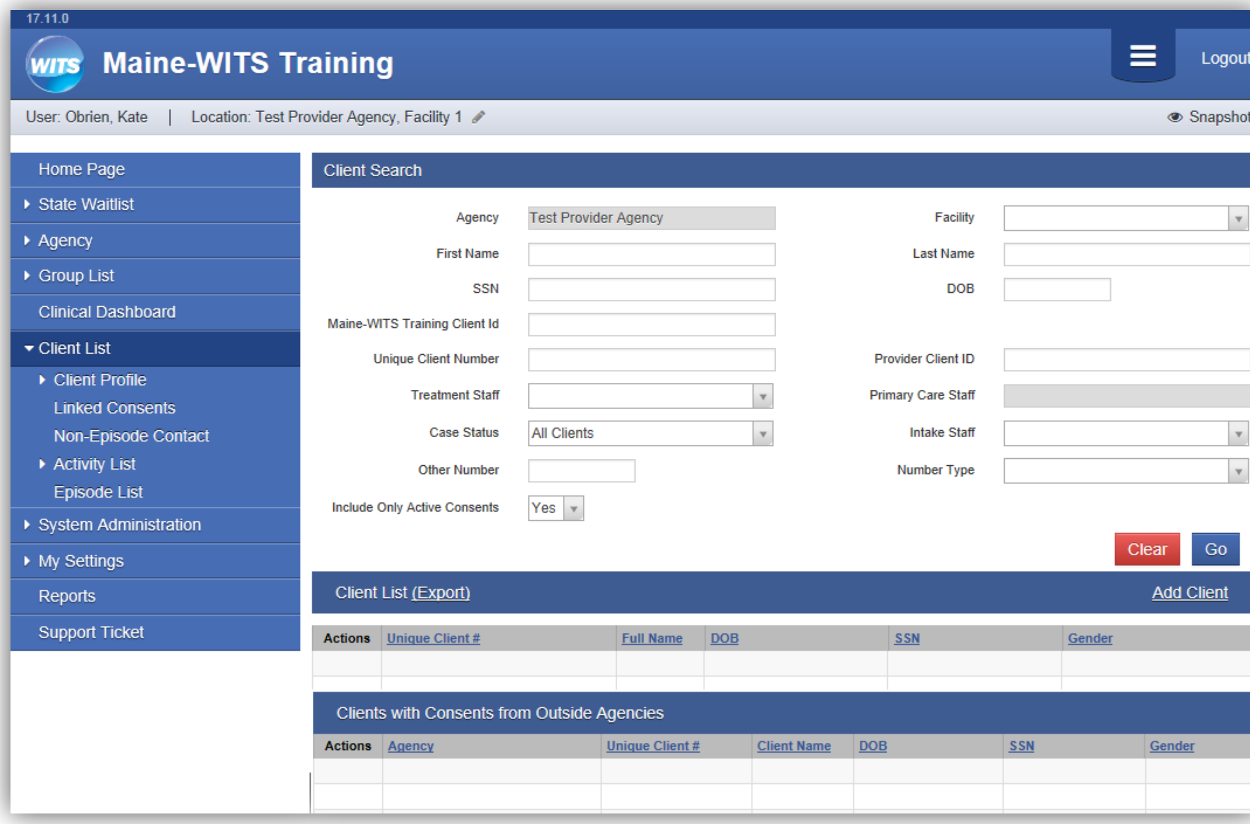
To search for a client, click on the **Client List** link in the left navigation menu. A blank Client List screen will appear. WITS will search on any fields you fill in, once you click on **Go** (or a full client list will be returned if fields are not filled in). The more fields you enter, the fewer records the system will return. Try to use unique information, such as birthdates or social security numbers, if possible.

You can also enter a partial name (or other field) with the use of an asterisk (*). This is called a wild card search.

> To search for a name (or other field) that **begins** with a letter or number, enter the beginning of the text (e.g. "Smit") and then an asterisk (e.g., "Smit*"). This will display "Smith", "Smitty", "Smithson", or any entry that begins with "Smit".
>
> To search for a name (or other field) that **contains** a letter or number, enter an asterisk (*), then any part of the letter or number (e.g. "123-45-6789"), and end with another asterisk (*). For example, "*6789*" will display any entry with "123-45-6789" in the field.

To search an existing client, conduct the following steps:

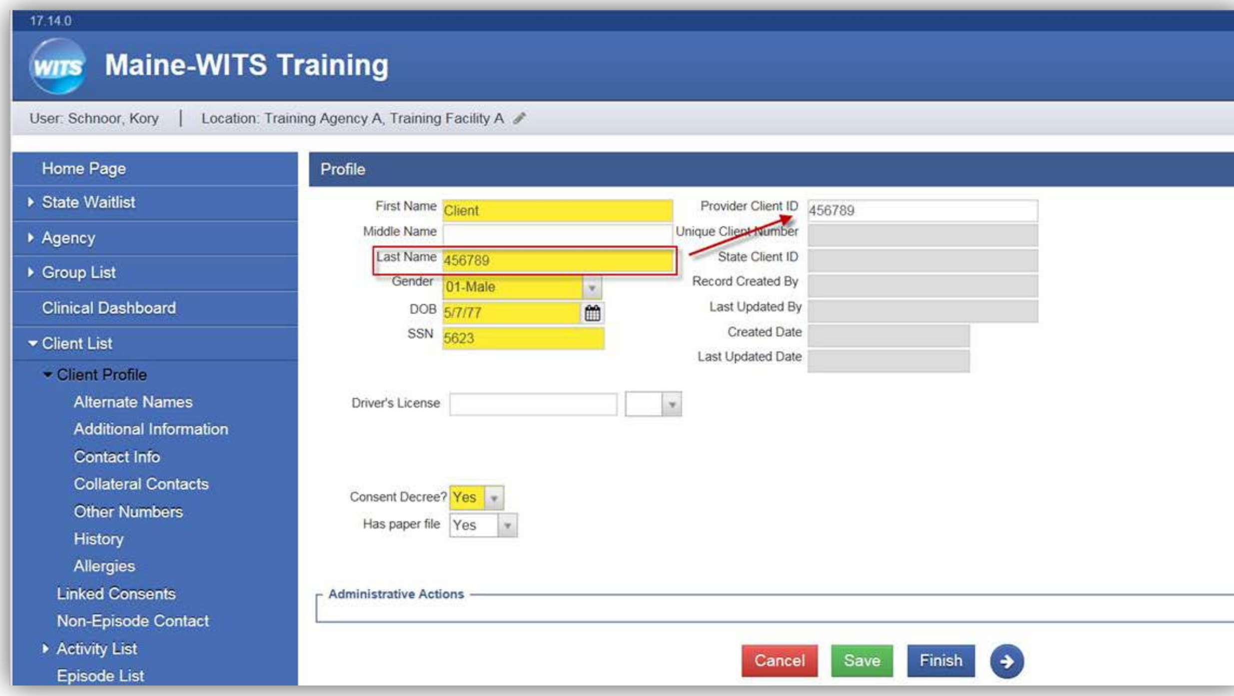
1. On the navigation menu, click **Client.**
2. Use any search parameter on the Client Search (see below) to limit the search for the client you are looking for.
3. Click **Go**.
4. Once you find the right person, pull up the profile by clicking on **Profile** next to their name under the Actions column.



To search an existing TDS client, conduct the following steps:

1. On the navigation menu, click **Client.**
2. Use either of the following Search Fields:
    a. **Last Name**: This will contain the TDS client number
    b. **First Name**: Enter "TDS"
    c. **SSN**: Enter the entire SSN or last 4 digits of the SSN
    d. **DOB**: Enter the client's Date of Birth
3. Click **Go**.
4. Once you find the right person, pull up the profile by clicking on **Profile** next to their name under the Actions column.

NOTE: The TDS Number will be the client's last name in the WITS System, so you can use the **last name** field to search for the TDS number in the **Client Search** screen. Once you have found the client, copy and paste the TDS client number from the **last name** field into the **Provider Client ID** field. This will allow the user to keep the TDS number associated with the client's profile in WITS as well as allow the user to enter the actual last name of the client.

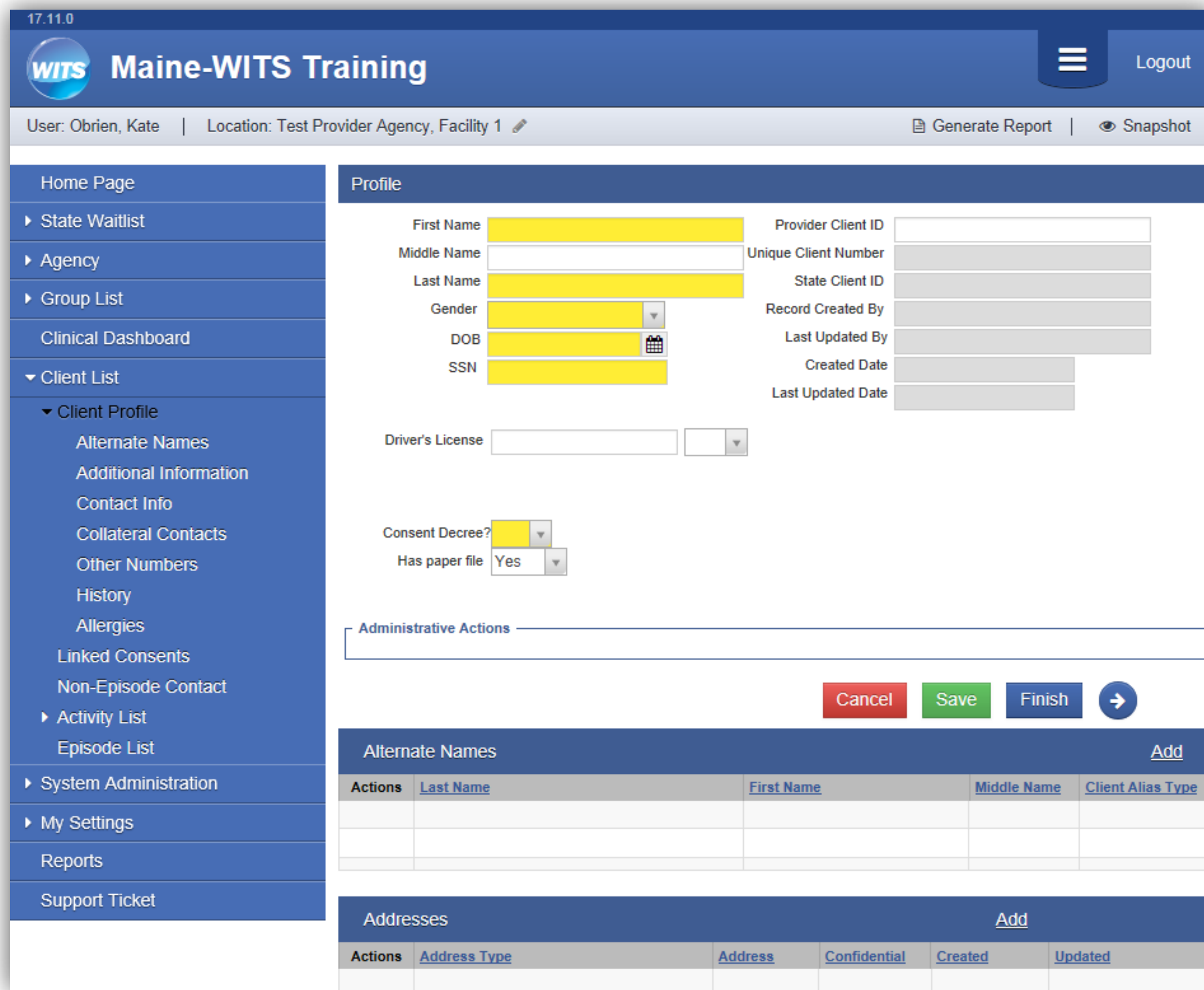


If you do not find your client, you can create a new one.

Add a New Client

To add a client, make sure that you are in the client list screen by clicking on the **Client List** link in the left hand navigation menu.

1. From the **Client List** screen, click on the **Add Client** link. The client profile screen will then appear.
2. In the **Client Profile** screen, enter in the client information including **First Name**, **Last Name**, **Gender**, **DOB**, **SSN** and **Consent Decree**.
3. To complete your entry, click **Finish** and the client record will be created.



4. If you would like to add optional client profile information including **Alternate Names**, **Additional Information**, **Contact Info, Collateral Contacts, Other Numbers,** and **Allergies** click on the **right arrow**.
5. When you click on the **right arrow** button, the **Alternate Names** screen shows up.
6. If you click on **Add Alternate Name** link, the bottom half of the screen becomes editable. Fill in the **First Name**, **Last Name** and **Middle Name**.
7. When complete, click **Save**. The names now show up in the table on top of the screen.

Tip: The unique Client ID is created based on the client name, DOB and SSN. It is important that the client information is entered properly the first time, as this will help to avoid duplicate entry of clients in the future.

8. Click on the **right arrow** button to continue entering client information.

Tip: The client's nickname or street name may be entered here. You will be able to use this alternate name to search for this client on the Client List screen.

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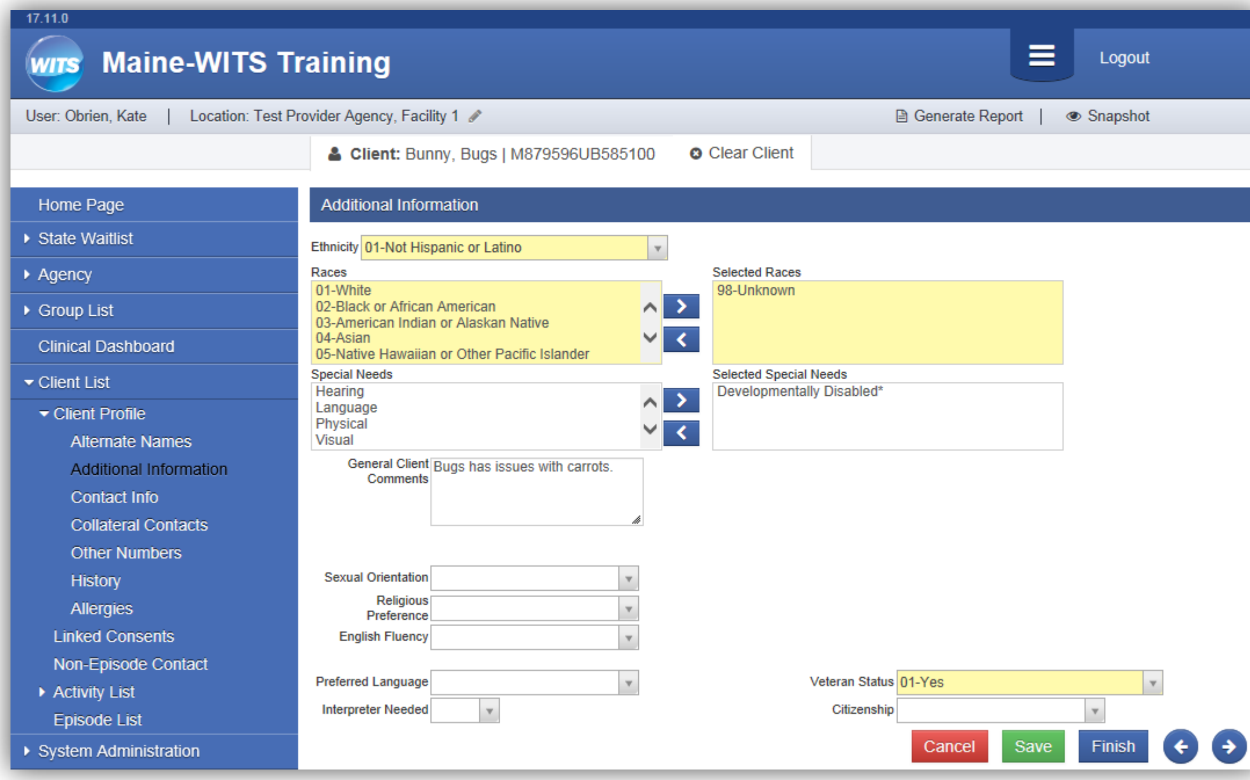
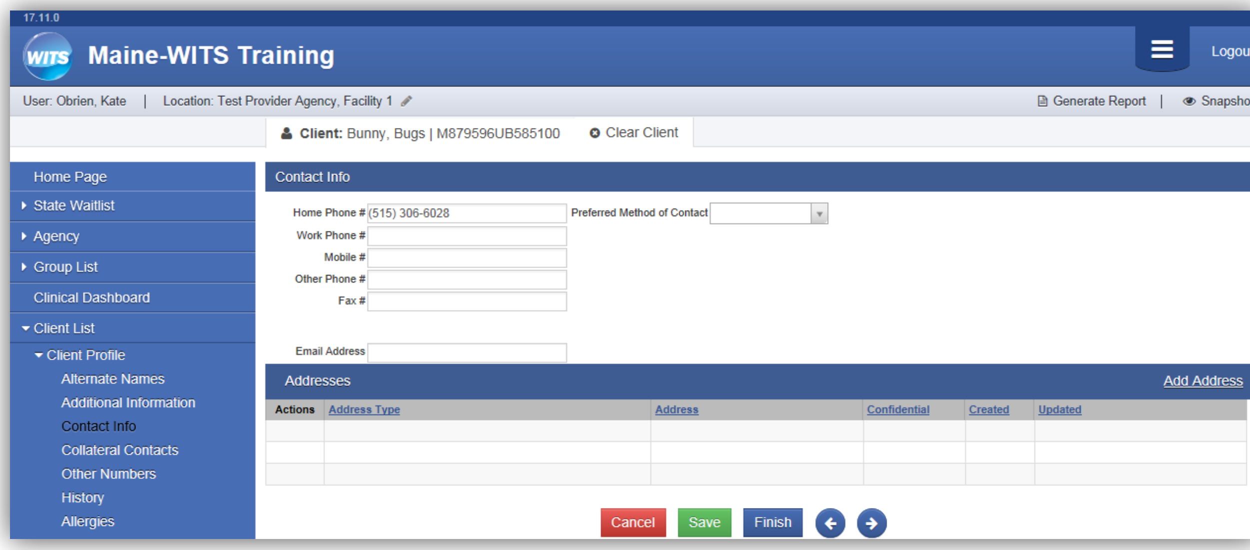
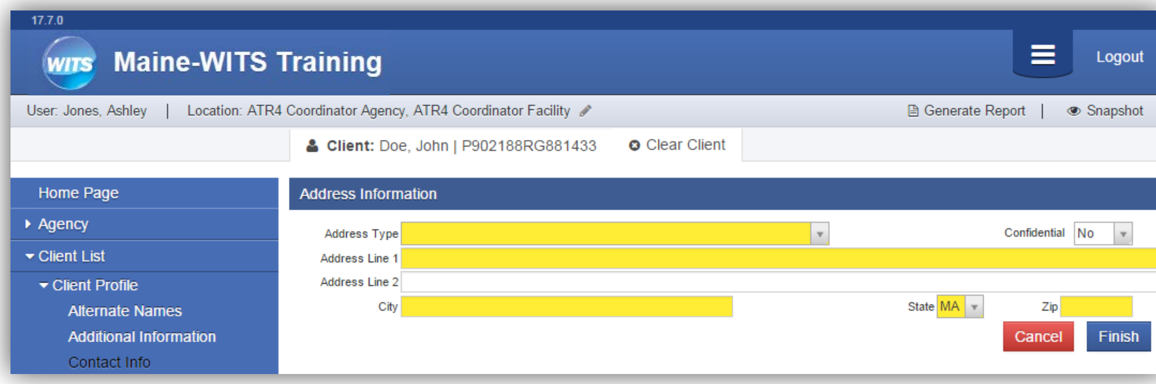
9. When you click on the **right arrow** button, the **Additional Information** screen shows up.
10. Select a **Race** from the mover box and click on the **mover button** to move it to the **Selected Races** box.
11. You can fill in other details on the screen such as **Ethnicity**, **Tribe**, **Special Needs**, etc.
12. When complete, click **Save** or **Finish**. The names now show up in the table on top of the screen.



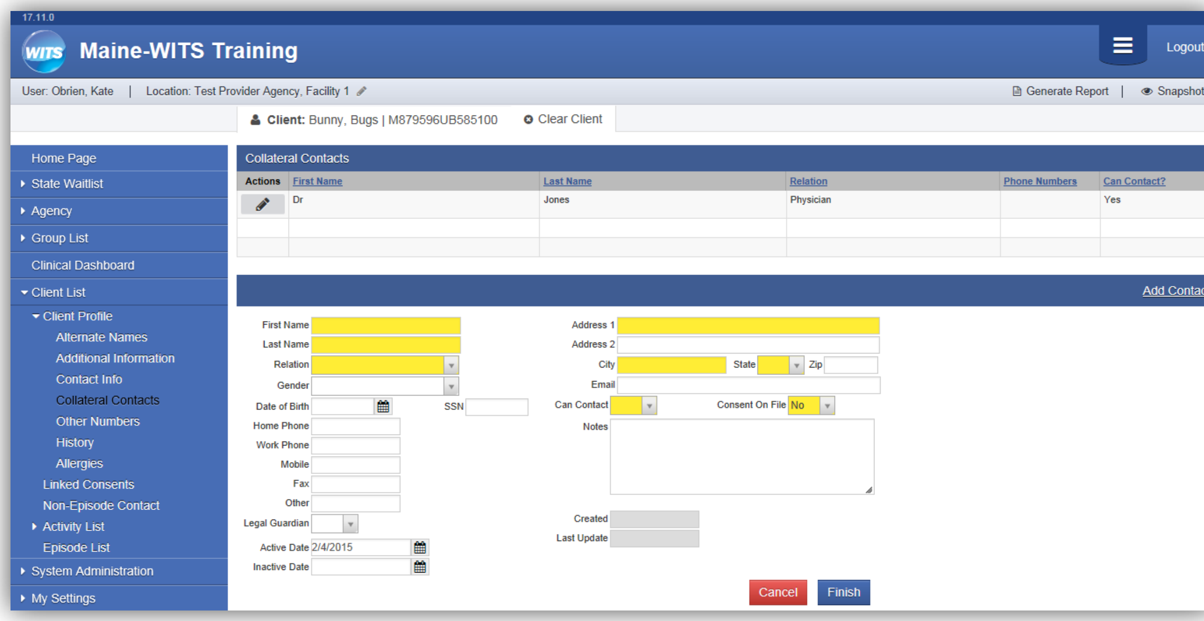
13. Click on the **right arrow** button to continue entering client information.
14. When you click on the right arrow button, the **Contact Info** screen shows up. Click on the **Add Address** link.



15. The **Address Information** screen opens. You need to fill in the **Address Type**, **Address line 1**, **City**, **State**, and **Zip Code**.

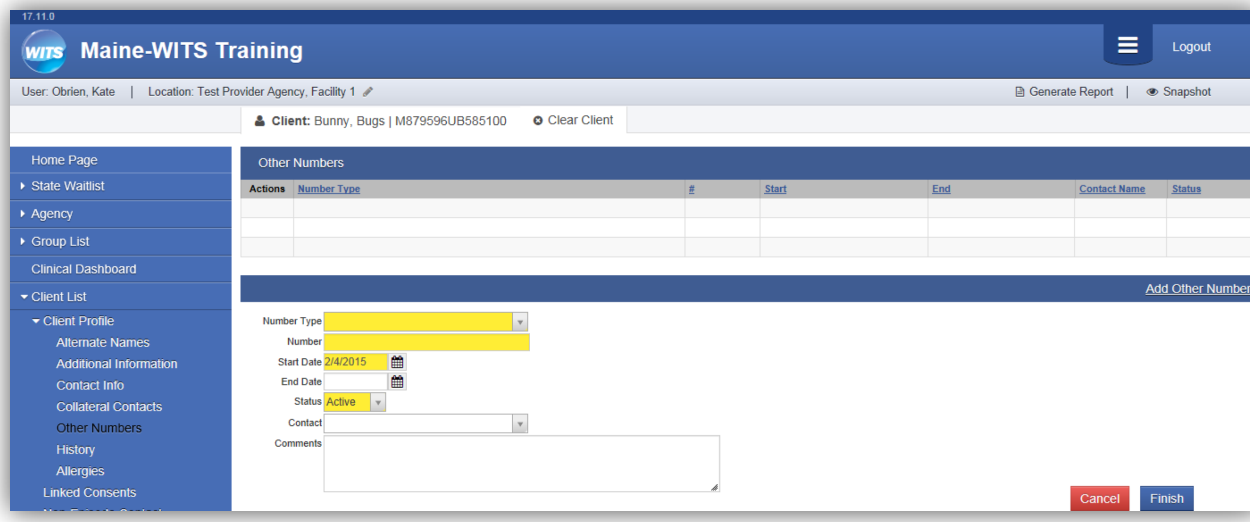


16. When complete, click **Finish**. This takes you back to the **Contact Info** screen where you will see the address populated. You may enter several addresses for a client. If a client has a new address, you can update the **Address Type** of the current address record to **Previous**, then create a new one.
17. Click on the **right arrow** button to continue entering client information.
18. When you click on the **right arrow** button, the **Collateral Contacts** screen shows up. Click on the **Add Contact** link.
19. The bottom half of the screen now becomes editable. You can now fill in information about the collateral contact such as **First Name**, **Last Name**, **Relation**, **Address 1, City, State, Can Contact,** and **Consent on file** of the contact.
20. When complete, click **Finish**. The names now show up in the table on top of the screen.



Tip: Collateral contacts are used to gather information about other people involved in the client's life in case you need to get in contact with the client (i.e. probation officer, parents etc.)

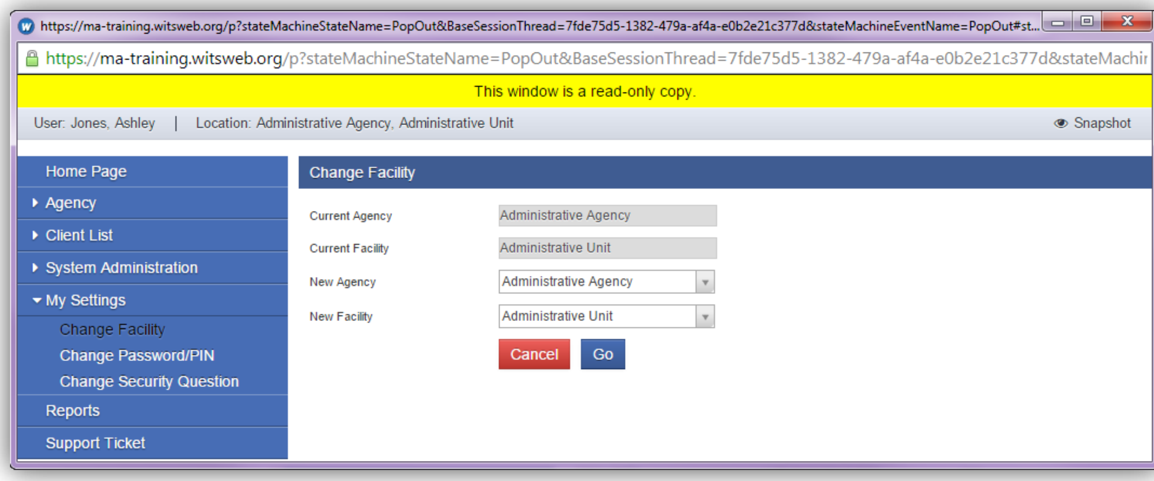
21. Click on the **right arrow** button to continue entering client information.
22. When you click on the **right arrow** button, the **Other Numbers** screen shows up. Click on the **Add Other Number** link.
23. The bottom half of the screen now becomes editable. You can now fill in information such as **Number Type**, **Number**, **Start Date,** and **Status.**
24. When you click on the **Contact** dropdown box you can see the names of the **saved Collateral Contacts** from the previous screen. If the name of the Collateral contact is not present, you can add a new contact by clicking on the **Add Contact**. This takes you back to the **Collateral Contacts** screen.
25. When complete, click **Finish**. The names now show up in the table on top of the screen.



Section 4. Hints

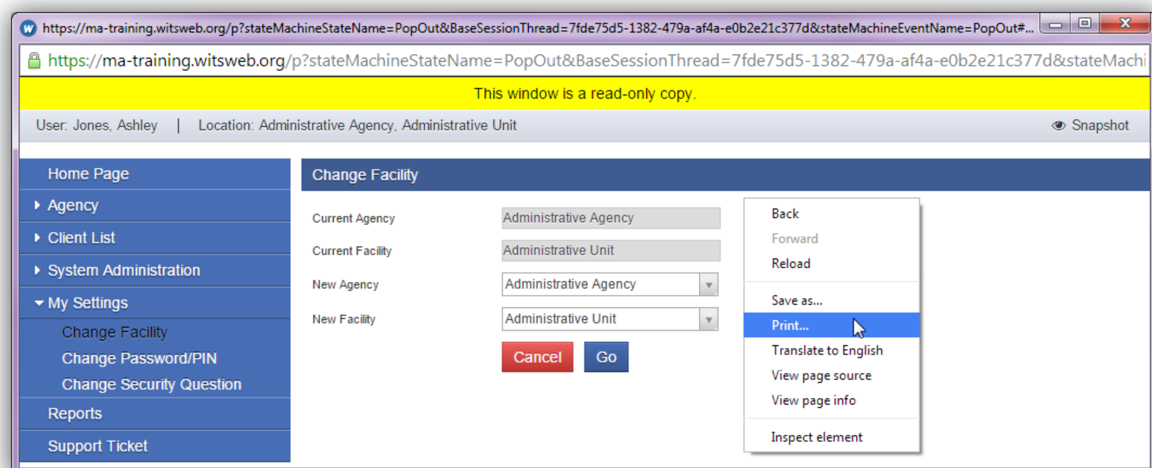
Snapshot feature

The new **Snapshot** feature opens up a separate window containing a read-only copy of your screen. This useful tool allows you to access other screens in WITS while still viewing the information within the Snapshot. Multiple Snapshots windows can be open simultaneously.

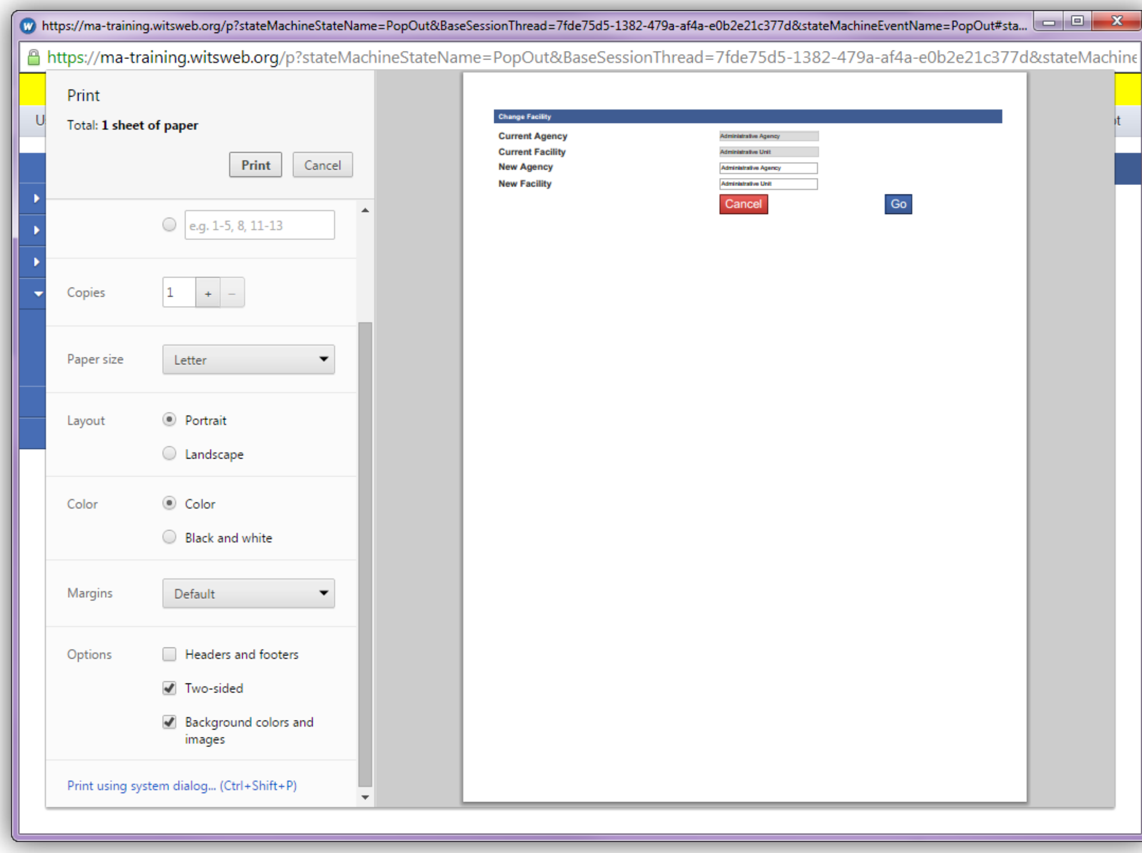


Print Function

Use your browsers print function to print your screen. Using your mouse, **right click** on your screen to open a list of options, then click **Print**.



In the print preview, notice the system saves ink by only printing the main section of the screen.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https://ma-training.witsweb.org/p?stateMachineStateName=PopOut&BaseSessionThread=7fde75d5-1382-479a-af4a-e0b2e21c377d&stateMachine
Print
Total: 1 sheet of paper
Print
Cancel
e.g. 1-5, 8, 11-13
Copies
1
Paper size
Letter
Layout
Portrait
Landscape
Color
Color
Black and white
Margins
Default
Options
Headers and footers
Two-sided
Background colors and images
Print using system dialog... (Ctrl+Shift+P)
Change Facility
Current Agency
Current Facility
New Agency
New Facility
Cancel
Go